

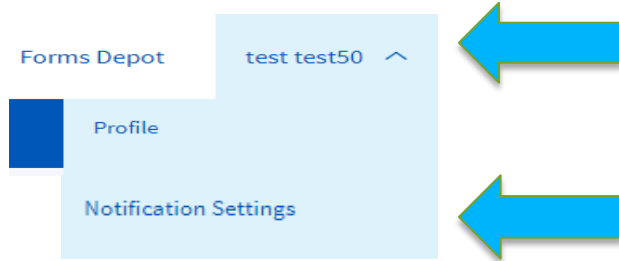


Connex & How to Manage Your Business

Presented by: Nick Petruzzelli (Field Trainer)

Connex & How to Manage Your Business

- Under your Profile Tab in Connex you can manage your email notification settings for your business.



New Business Hide Details ^

New Business Case Summary (Annuity pending information only at this time)
Receive periodic updates on pending case requirements; click to select your preferred frequency.

10 ▼

Once daily ▼

06 ▼ 30 ▼ AM ▼

Application Submitted Notification
Real-time notifications confirming an application has been received.

Underwriter Decision Notification
Real-time notifications of the underwriting decision for your submitted cases.

Inforce Hide Details ^

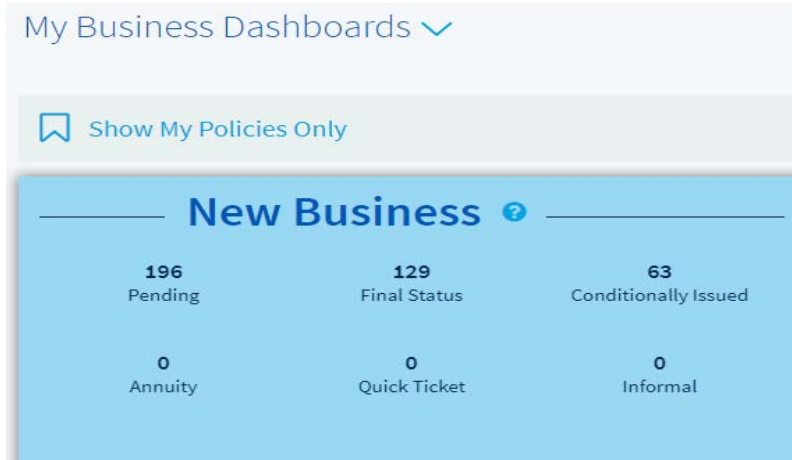
Grace/Lapse Notification (Not available at this time)
Receive daily alerts when inforce cases move into grace and lapse periods.

CANCEL **SAVE**



Connex & How to Manage Your Business

- Utilize Connex to manage your pending business on your My Business Dashboard.



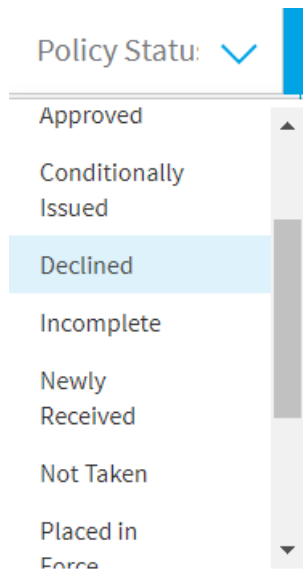
Your pending business will display on the New Business Tile under a specific category.

Agent Name Agent#/Agency# ↓↑	Policy Number ↓↑	Insured Name ↓↑	Product Type ↓↑	Status ↓↑ ?	Last Update/Policy Sent Date ↓↑	Face Amount ↓↑	Premium ↓↑	ePolicy Delivery ↓↑
JEFFREY GOWER 2Q73D-AGL 1U814	POLPRNT001	Satfiteenusl, Bert	Term Life Insurance	Conditionally Issued	09/22/2017	\$21,000,000.00	\$498,586.69	
FGHFGH, FSEFS 1U814-AGL	TESTUL3001	Qflxseventeenagl, Pansy	Indexed Universal Life	Submitted	04/26/2017	\$15,550,000.00	\$269,792.53	
FGHFGH, FSEFS 1U814-AGL	TESTUL3002	Qflxseventeenagl, Pansy	Indexed Universal Life	Submitted	04/26/2017	\$15,550,000.00	\$269,792.53	
FGHFGH, FSEFS 1U814-AGL	TESTUL3003	Qflxseventeenagl, Pansy	Indexed Universal Life	Submitted	04/26/2017	\$15,550,000.00	\$269,792.53	



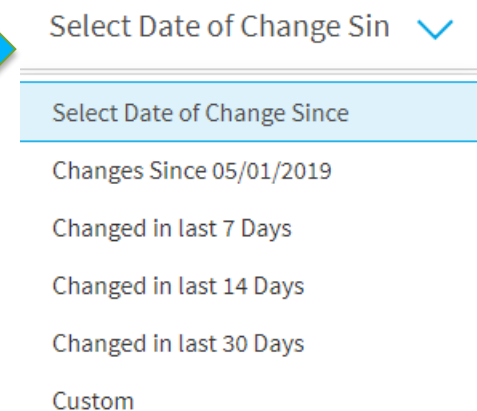
Connex & How to Manage Your Business

- Your Pending New Business can be sorted/filtered in many effective ways.



The policy status filter allows you to search each category for a status.

The Select Date of Change Since allows you to filter by date using a customizable calendar.



Connext & How to Manage Your Business

- Advanced Filtering is available on Connext to assist in finding a policy or client faster.

Advanced Filters

Policy Status Insured Last Name Product Type

You may select more than one policy status. *You may select more than one product type.*

Agent Last Name Agent Code Policy Number

You may select more than one agent code.

Owner Name (last, first) Insured State

Face Amount - Agent Search Ty Agent Search Type

Premium -

Premium is based on annualized premium

- ePolicy Delivery specific filtering

ePolicy Delivery

Electronic Delivery

eSignature Statu ePolicy Search Date Start Date - End Date

ePolicy Status - Viewed by policy owner

eSignature Status - Complete



Connex & How to Manage Your Business

- The Conditionally Issued category is for approved cases with outstanding requirements.

Agent Name Agent#/Agency# ↓↑	Policy Number ↓↑	Insured Name ↓↑	Product Type ↓↑	Status ↓↑	Last Update/Policy Sent Date ↓↑	Face Amount ↓↑	Premium ↓↑	ePolicy Delivery ↓↑
FGHFGH, FSEFS 1U814-AGL	ADVTRMRP01	ADVREPTRM, Jorge	Term Life Insurance	Conditionally Issued	06/26/2017	\$600,000.00	\$16,429.92	
FGHFGH, FSEFS 1U814-AGL	18RPTQOLA1	NEWREPRICE, ERICK	Term Life Insurance	Conditionally Issued	01/03/2018	\$3,000,000.00	\$9,873.60	
FGHFGH, FSEFS 1U814-AGL	17ORGTRM01	REGRESSREPRICE, ERICK	Term Life Insurance	Conditionally Issued	01/08/2018	\$3,000,000.00	\$9,666.00	
FGHFGH, FSEFS 1U814-AGL	18RPTQOLA3	NEWREPRICE, RALPH	Term Life Insurance	Conditionally Issued	01/15/2018	\$350,000.00	\$5,744.68	
FGHFGH, FSEFS 1U814-AGL	ORIGTRMQ01	QORGTERM, ERICK	Term Life Insurance	Conditionally Issued	06/13/2017	\$3,000,000.00	\$4,387.50	
FGHFGH, FSEFS 1U814-AGL	QBDVFT4P01	QADVJAN, Kyle	Term Life Insurance	Conditionally Issued	03/12/2019	\$395,000.00	\$4,071.72	✓

- Upload your outstanding delivery requirements directly into Connex.

Signed Amendment **Open** **4/16/2019** **4/16/2019** **Primary** **Agent**

Comments

Required Documents

Upload fun... GO **SAVE DOCUMENT**

Send an email

To: *shareservicesproducercare@aig.com*
Subject: *Conditionally Issued 4180118574 - Signed Amendment*

SEND AN EMAIL

Single requirements

“Messaging” can send multiple documents

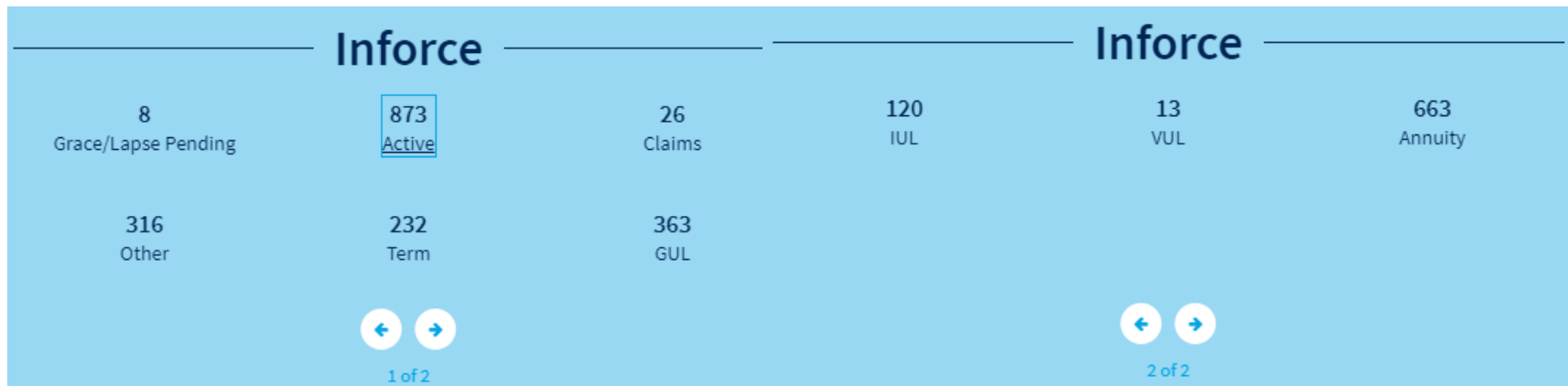


Connex & How to Manage Your Business

- View your Placed in Force cases in the Final Status Section and In Force Tile on Connex.

Agent Name Agent#/Agency# ↓↑	Policy Number ↓↑	Insured Name ↓↑	Product Type ↓↑	Status ↓↑ ?	Last Update/Policy Sent Date ↓↑	Face Amount ↓↑	Premium ↓↑	ePolicy Delivery ↓↑
FGHFGH, FSEFS 1U814-AGL	2019040119	Policy, Connex	Term Life Insurance	Placed in Force	04/25/2019	\$288,888.00	\$290.76	✓
FGHFGH, FSEFS 1U814-AGL	2019040111	EDELTERMTX, John	Term Life Insurance	Placed in Force	04/18/2019	\$300,000.00	\$284.04	✓

- The Inforce Tile allows you to navigate multiple categories of your inforce business.



Connex & How to Manage Your Business

- Once your policy is paid and Inforce you can view your Commission Statements on the Commission Dashboard in Connex.

Commission Finder

Commission Quick Search

Search Statements (i.e. by policy number, amount, insured or agent name)

COMMISSION SUMMARY

ADVANCED SEARCH AND REPORTING

- My Recent Commissions statements.
Advanced Search and Reporting

Agent Only Include Related Agents

Agent ID/Primary Agent ID ? Agent ID/Primary Agent ? Last/Corp Name SSN or Tax ID

NPN Username

Statement Text Search Date Range -

SEARCH STATEMENTS

